
30-Day Marketing Optimization

A focused template for
turning insight into action



Marketing efforts tend to accumulate quietly. New tactics get added, old ones linger, and over time it becomes harder to tell what is contributing to growth versus what is simply consuming your time. This exercise creates space to evaluate what you are already doing and make a small number of deliberate decisions about what to continue, refine, or stop.

As you work through this exercise, be honest, not aspirational. Focus on outcomes, not effort or intention. And resist the urge to optimize everything at once. **The value of this exercise comes from narrowing your attention, not expanding it.**



STEP 1

Take Inventory

Before you decide what to change, it helps to see everything you are already doing in one place. Use the table below to list each marketing activity you currently invest time or money in, such as events or seminars, digital ads, email marketing, and social media.

Activity & Channel	Time Invested (Low, Medium, High)	Cost (Low, Medium, High)	Type of Conversations It Generates

STEP 2

Sort Activities Using a Keep-Fix-Ditch Framework

Not every effort needs attention right now. Some are working as intended, some need adjustment, and some should be paused. This framework separates impact from habit.

Definitions



Keep: Consistently produces qualified conversations or clients



Fix: Shows potential but lacks consistency or alignment



Ditch: Consumes time or resources without meaningful return

Questions to Ask

Does this attract the right people?

Does it lead to real conversations?

Would I put more time or money behind this?

If I stopped doing this, what would I lose?

Does this still fit how I want to grow, or is it something I have kept out of habit?

Keep	Fix	Ditch

STEP 3

Choose a 30-Day Focus Area

Progress is easier to track when your attention is concentrated. Choose one priority for the next 30 days so you can see what changes, without spreading effort across too many moving parts.

Select one effort to expand from **Keep** or improve from **Fix**. Activities marked **Ditch** are paused for now.

My 30-day focus: _____

Why this deserves attention now: _____

How I plan to expand or improve: _____

STEP 4

Feasibility Check

A good decision only works if the environment can support it. This quick check helps identify constraints before they become friction.

Check all that apply:

- | | |
|---|---|
| <input type="checkbox"/> Someone clearly owns execution | <input type="checkbox"/> Progress can be measured without added reporting |
| <input type="checkbox"/> Time is available to follow through | <input type="checkbox"/> The plan does not rely on a quieter season |
| <input type="checkbox"/> Compliance or approval requirements are understood | <input type="checkbox"/> The next step is clear enough to start this week |

STEP 5

Define Success

Select one effort to expand from **Keep** or improve from **Fix**. Activities marked **Ditch** are paused for now.

Set expectations in advance so you can evaluate the next 30 days with a steady point of reference.

What progress looks like in 30 days: _____

One signal I will look for: _____

What I will stop doing during this period: _____

STEP 6

Reflect

After 30 days, revisit this page and note what you learned.

What surprised me most in this process? _____

What would I approach differently next time? _____

What should I carry forward into the next 30 days? _____

Moving from Reset to Routine

Some advisors repeat this reset periodically on their own. Others prefer a structured, education-first system that supports steadier marketing decisions over time. If you would like to see how that works in practice, reach out to FMT Solutions to learn about the Financial Educators Network, FMT Solutions' flagship classroom-based product.

Contact Us Today

877-575-4205

advisors@fmtsolutions.com

fmtsolutions.com